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The Economic Impact Of the Barnes Exhibit

Final Report

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Tourism and Recreation*

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Resesarch
Resolutions

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I. Introduction

A. Background

A major art exhibition *From Cézanne to Matisse: Great French Paintings from the Barnes Foundation* was open to the public at the Art Gallery of Ontario (AGO) from September 17, 1994 through January 1, 1995. During this time period, it is estimated that nearly 600,000 individuals including almost 500,000 general admission visitors and about 100,000 school students, corporate guests and other visitors saw the collection of 83 impressionist and post-impressionist paintings. The Barnes Exhibit was promoted by the AGO as a **once in a lifetime** or **blockbuster** event and received widespread attention from Canada's cultural community and the media.

Bringing the exhibit to Toronto and marketing it required considerable investment of human resources and finances. Financial backing for the project was provided, in part, by the Ontario Ministry of Culture, Tourism and Recreation, who gave the Art Gallery of Ontario \$3.75 million. It was estimated that the Barnes Exhibit might contribute approximately \$35 million in out-of-town visitor spending to Ontario's economy.

Rather than relying on estimating procedures alone to determine the overall economic impact of the exhibit on Ontario's economy and the local economy, the Ministry commissioned Research Resolutions¹ and Econometric Research Limited to conduct an economic impact study of the exhibit. The purpose of the study was twofold:

- \$ To estimate the economic impact of the Barnes Exhibit on Metropolitan Toronto and Ontario as a whole; and
- \$ To provide a *baseline* methodology for economic impact studies for other cultural events.

Key information requirements of the project included:

- \$ Estimates of visitor volume and spending by origin (local residents, other Ontario residents, residents of Quebec, residents of the USA, and others);
- \$ Estimates of economic impact of the Barnes Exhibit on the local and provincial economies, in total and by origin group; and
- \$ Visitor profile information.

Research Resolutions

The Barnes Exhibit Economic Impact Study is based on the reported spending and behaviour of a large number of visitors to the exhibit. The full methodology for the study, including the procedures used to estimate spending associated with a visit to the Barnes Exhibit, are described in greater detail in the technical appendix for the study.

B. Methodology

A systematic sampling plan

Because the Barnes Exhibit covered a relatively long time span that included major holiday periods such as Thanksgiving (Canadian and American), Christmas and New Year's, the study was designed to ensure that all time periods throughout the fifteen weeks of the exhibit had an opportunity to fall within the sample. By selecting sampling periods from among weekdays, weekends and holidays, the survey designers ensured that all types of visitors, who could represent different spending, behavioural and demographic characteristics, were captured in the study. Twenty-five time slots during which the Barnes Exhibit was open for general admission² were selected as interviewing periods.

Each time slot lasted between six and ten hours to ensure that people entering the exhibit at the beginning of a sampled time period had a chance to be interviewed at the end of their stay at the Art Gallery of Ontario. In other words, interviewers were still available to conduct exit interviews for visitors who viewed the Barnes Exhibit and then toured other galleries of the AGO, or had a meal or a break in the restaurant or cafeteria before leaving the building.

Oversampling of Out-of-Towners

Because the distribution of visitors to the Barnes Exhibit by place of residence was not known in advance of the study, survey designers developed a sampling plan that would guarantee minimum levels of response from key interest groups, including residents of Quebec, the USA, Ontario outside Toronto, and Toronto itself. These minimums were necessary to ensure that the estimates of economic impact and visitor characteristics would be reliable for these sub-groups of the total visitor population, and were achieved by setting minimum numbers of completions for key groups (quotas). To ensure that minimum numbers of interviews were conducted with visitors from these locations, oversampling was undertaken. Data from oversampled groups were then adjusted to represent the actual proportion they represented of the visitor population.

13,000 visitor parties tallied

Although ticket sales reflect the number of paying visitors who attended the Barnes Exhibit, these data do not necessarily provide information on where the visitors live or how many people were in the visitor party. In order to estimate from the survey sample the actual proportion of visitors who came to the Barnes Exhibit from the Toronto area, other Ontario locations, other Canadian provinces, the USA and other countries, a visitor tally procedure was established. As people entered the Barnes Exhibit, they were stopped by trained interviewers and asked to identify where they lived, how many people from the same household were with them on the visit to the Barnes Exhibit, and the age profile of the visitor party.

Over the 15 week run, 13,335 household parties, representing 22,349 individuals, were interviewed in the tally process. Information from tallied household parties was used to implement the oversampling process and to weight and project the completed surveys. Information based on the tally data is considered accurate within 1% at the 95% level of confidence.

Spending estimates of visitor groups not captured through the survey, such as those attending corporate events and those participating in school trips to the Barnes Exhibit, were calculated based on volume and value data supplied by the Art Gallery of Ontario.

1,600 visitor parties interviewed in the Exit Survey

After the tally, an adult representative of the household visitor party who claimed to have made most of the travel arrangements to visit the Barnes Exhibit and was best able to comment on trip activities and spending was asked to participate in an Exit Survey. These individuals were supplied with an identifying tag to be worn throughout the remainder of their stay at the AGO.

Visitors selected in the tally procedures at the beginning of their visit to the Barnes Exhibit were interviewed as they were about to leave the building. To ensure that all on-site spending had been made prior to the interview, interviewers were stationed immediately adjacent to the exit of the Art Gallery. The Exit Survey covered detailed spending information at the Art Gallery and all other spending in Ontario on the trip that included the visit to the exhibit, details about nights spent in Ontario and accommodation used, demographic and other behavioural information, and an overall assessment of the visit to the AGO. At the end of the interview, all non-local Ontario residents, Quebec residents and USA residents were asked if they could be re-contacted by telephone for a second interview once they had arrived home from the trip.

The Exit Survey took approximately five minutes for local residents and ten minutes for out-of-town residents to complete. English and French language questionnaires were available. Bilingual interviewers were on-site to administer the tally questions and Exit Survey during each interviewing period. Exit surveys were completed with 1,595 household visitor party representatives. This sample size is considered accurate within $\pm 2.5\%$ at the 95% level of confidence.

All survey procedures were designed and implemented with the full support and co-operation of the Art Gallery of Ontario.

Follow-up Telephone Surveys

Given that the trip which included the visit to the Barnes Exhibit had not ended when people were interviewed while at the Art Gallery, all spending reported by non-local visitors had to be considered *estimates* of total spending in Ontario. Only once the visit to Ontario was completed was it possible to determine all spending on the trip. Therefore, to maximise the accuracy of reported expenditure data, a follow-up telephone interview was included in the basic design of the study. This interview was conducted with co-operative visitors from Ontario (outside Toronto), Quebec and the USA.

The follow-up telephone survey was administered to 518 representatives of household parties who lived outside Toronto (but in Ontario), in Quebec and in the USA and who had been interviewed at the AGO (Exit Survey). It was conducted by trained interviewers in supervised central location facilities in Toronto and Montreal (offering bilingual capabilities) soon after the respondent arrived home. The questionnaire captured final expenditure estimates for the whole trip, along with activity and image information.³ All interviewing on the project was conducted by Consumer Contact – a marketing research field and tabulation specialist in Toronto.

Data handling and tabulation procedures

All survey data were edited for internal consistency. Completed questionnaires were then coded and tabulated. All data handling and tabulations were undertaken by Consumer Contact, under the supervision of the Research Resolutions project director. Once a clean data file was prepared, adjustments were made to take into account the distribution of prepaid package expenditures to specific items included in the package, distribution of expenditures to categories of expense for those respondents who could report only a ~~total~~ expenditure for the trip⁴, and the development of average dollar values that could be assigned to categories of expense in which a respondent indicated that money was spent but the amount was not known.

In addition, adjustment factors for respondents who did *not* complete the telephone survey were developed based on the paired responses of those visitors who completed both the exit and telephone survey. These adjustment factors were prepared and applied on a category by category basis.

Data were weighted and projected, taking into account the type of time period the interview represented (e.g., weekend, weekday morning, weekday afternoon/evening), the date of the interview, and party size distributions by origin. The final adjustment projected Exit Survey respondents to ticket sales data for general admission periods provided by the Art Gallery of Ontario (499,233). Non-survey sources were used to estimate the volume and expenditures of student groups and special events sponsored by corporations (these data were provided by the AGO).

Total spending in Ontario

The study provides different types of spending and economic impact estimates. The starting point for all estimates is the total amount spent *in Ontario on the trip that included the Barnes Exhibit visit* as reported by respondents in the surveys⁵. Survey respondents were asked to estimate how much they had and/or expected to spend on the trip that included the Barnes Exhibit visit, on a category by category basis. These expenditures, presented in total and for individual categories of expense, constitute *total spending in Ontario*.

Total spending attributable to the Barnes Exhibit

Not all the money spent in Ontario by a Barnes Exhibit visitor is *attributable* to the Barnes Exhibit. Therefore, it was decided to allocate to the Barnes Exhibit Account only the proportion of total Ontario spending that corresponded to the level of influence the *visitor* assigned to the Barnes Exhibit in his or her decision to visit Toronto.

For example, if a person were spending three nights in a hotel in Toronto because she or he was in town on business, the hotel and meal expenses associated with the three nights may have been spent whether the Barnes Exhibit was in Toronto or not. This visitor may say that the Barnes Exhibit had no influence on his/her decision to come to Toronto and might assign a "1" or a "0" to the Barnes Exhibit's influence on the decision, using an eleven point scale ranging from zero to ten. In this event, no spending other than that spent at the AGO on the day of the visit would be directly attributable to the Barnes Exhibit. If the visitor accorded the Barnes Exhibit an influence of "5" on his/her decision to visit Toronto, fifty percent of off-site spending would be attributed to the Barnes Exhibit.

Responses within the questionnaire were used to determine the level of influence on a case-by-case basis. With few exceptions, all spending at the AGO on the day of the Barnes Exhibit visit (on-site spending) was attributed to the Barnes Exhibit.

Total expenditures directly attributable to the Barnes Exhibit include the following elements:

- \$ the proportion of total spending that was assigned to the Barnes Exhibit based on the visitor's estimate of influence; and
- \$ spending estimates provided by the Art Gallery of Ontario for visitor groups not captured through the survey, such as those attending corporate events and those participating in school trips to the Barnes Exhibit.

The steps in the process are described in greater detail in the full technical documentation for the study.

Economic Impact of the Barnes Exhibit

Once estimates of total spending and spending directly attributable to the Barnes Exhibit were calculated from survey and AGO data for students and other events, they were incorporated into an economic impact model designed and implemented by Dr. Kubursi of Econometric Research Limited. Dr. Kubursi's model provides estimates of the total amount of economic activity generated by spending associated with visits to the Barnes Exhibit (*gross impacts*) and the volume of economic activity that can be said to have occurred in Ontario *solely* because the Barnes Exhibit was shown at the Art Gallery of Ontario (*incremental impacts*). Estimates of economic impact are provided for Toronto and for the entire province.

Survey Materials & Reports

Copies of all questionnaires used in the study are appended to this report. As noted previously, details of the sampling, weighting and expenditure allocations are described in a separate volume. Detailed tabulations are also provided under separate cover.

II. Executive Summary

Almost 600,000 people visited the Barnes Exhibit at the Art Gallery of Ontario between September 17, 1994 and January 1, 1995.

Almost one-half of Barnes Exhibit visitors came from Metropolitan Toronto (284,000) and a further one-third lived in other parts of Ontario (196,000). Canadians from other provinces constituted almost ten percent of Barnes Exhibit visitors (52,000), the same proportion came from the USA (52,900) and two percent or 12,400 came from other countries (Table 8).¹

Almost \$75 million were spent in Ontario by visitors on the trips or excursions that brought them to the Barnes Exhibit (direct consumer spending).

This \$75 million in expenditures created ripple effects throughout Ontario's economy that stimulated the production of \$137 million of goods and services (value added).⁶

Over 2,000 jobs (person years of employment) were required to produce the \$137 million of output. These jobs, in turn, generated \$98 million in wages and salaries within Ontario. A total of \$42 million in federal, provincial and municipal taxes was generated. Ontario's share of total taxes was more than \$12 million. Federal taxes exceeded \$25 million and municipalities throughout Ontario received more than \$4 million in taxes (Table 1).

\$38 million in consumer spending are direct results of the Barnes Exhibit.

Approximately one-half of all spending done by people who visited the Barnes Exhibit, or \$38 million, occurred *solely* because the Barnes Exhibit was showing at the Art Gallery of Ontario.⁷ In other words, if the Barnes Exhibit had not been at the Art Gallery of Ontario, the province would not have enjoyed the economic benefits in jobs, wages and salaries, and in tax revenues created by \$38 million in direct consumer spending (Table 1).

¹ Tables can be found in the main body of the report.

The Barnes Exhibit produced \$71 million of goods and services (value added) throughout Ontario.

The \$38 million in consumer spending created ripple effects through Ontario's economy stimulating the production of \$71 million of goods and services (value added) directly attributable to the Barnes Exhibit (Table 1).

More than one-third of the economic activity in Ontario took place outside Metropolitan Toronto.

Of the \$71 million in economic activity directly associated with the Barnes Exhibit, \$27 million benefited Ontario's economic sectors located outside Metropolitan Toronto. The remaining \$44 million are associated with businesses in Metropolitan Toronto (Table 4).

The Barnes Exhibit directly produced 1,100 person years of employment in Ontario.

Almost 1,100 person years of employment were required to produce the \$71 million in goods and services directly associated with the Barnes Exhibit. This employment yielded wages and salaries in Ontario of close to \$51 million (Table 1).

Ontario's tax revenues increased by \$6.5 million directly because of the Barnes Exhibit.

Taxes directly associated with the Barnes Exhibit totalled almost \$22 million for the three levels of government, combined. Ontario's share of the tax bill was approximately \$6.5 million. Federal taxes approached \$13 million, and municipalities in Ontario received more than \$2 million in tax revenue because of the Barnes Exhibit (Table 1).

The Barnes Exhibit resulted in substantial exports.

Forty percent (40%) of the \$38 million in consumer spending that occurred in Ontario *solely* because of the Barnes Exhibit at the AGO was done by people who live *outside* Ontario. The Barnes Exhibit generated more than \$15 million in consumer spending from outside the province. The exhibit induced about \$7.5 million in spending within the province by visitors from the USA, a further \$7.1 million from residents of other Canadian provinces and just under \$1 million from residents of other countries. Ontario residents spent \$23 million in their province because the exhibit took place (Table 5).

Many sectors of the economy benefited from the Barnes Exhibit.

As a direct result of the Barnes Exhibit, over \$12 million were spent on food and beverages, primarily in restaurants and bars in Ontario⁸. The retail sector enjoyed \$8.5 million in purchases of souvenirs, clothing and other goods. Entertainment and recreation facilities, including the Art Gallery of Ontario, other cultural events and institutions, and movie theatres, had receipts of \$7.7 million because the Barnes Exhibit was in Toronto. Hotels and other forms of commercial accommodation sold about \$5 million in lodging because of the Barnes Exhibit (Table 7).

Spending at the Art Gallery of Ontario exceeded \$13 million during the course of the Barnes Exhibit.

Consumer spending in the Art Gallery of Ontario,⁹ as reported by interviewed Barnes Exhibit visitors, was divided among ticket sales (\$5.6 million), gift shop purchases (\$5.4 million) and meals and snacks consumed at the AGO's food service outlets (\$1.5 million). Almost one-half million dollars in Gallery membership fees were collected over the fifteen weeks of the Barnes Exhibit. On-site spending at the Art Gallery of Ontario represents more than one-third of all consumer spending that is directly associated with a visit to the Barnes Exhibit (see Notes for table).

More than 120,000 room nights were spent in Ontario's hotels, motels and other accommodation facilities by visitors who came to see the Barnes Exhibit.

Trips that included a visit to the Barnes Exhibit generated more than 300,000 room nights in Ontario¹⁰. About one-third of these room nights were spent in hotels in the province (106,300) and a further 14,300 were spent in other forms of commercial accommodation, including motels and bed and breakfast establishments¹¹ (Table 19).

Newspaper advertisements were the primary source of information about the Barnes Exhibit.

Survey respondents indicated that advertisements in daily or weekly newspapers (41%) and word-of-mouth from friends or family (27%) were the primary ways Barnes Exhibit visitors first heard about the exhibit. Other communication vehicles responsible for the initial awareness of the Barnes Exhibit were identified by respondents to be television (7%), radio (6%), other print advertising such as magazines (5%), billboards or posters (3%) and direct mail (2%) (Table 35).

Visitors were very pleased with their experience at the Art Gallery of Ontario.

When asked to rate their visit to the Art Gallery of Ontario on the day they went to the Barnes Exhibit, visitors gave the AGO an average rating of 8.5 on a scale ranging from *poor* (1) to *excellent* (10) (Table 34).

Barnes Exhibit visitors participated in other activities while in Ontario.

In addition to visiting the Barnes Exhibit, out-of-town visitors participated in other activities. Two-thirds went shopping, almost half dined in high quality restaurants, one-third went sightseeing, and about one-fifth participated in the nightlife Ontario has to offer or attended cultural performances in the province (Table 28).

III. Key Economic Indicators

C. Total Economic Activity In Ontario

1. Total (Gross) Value Added, Direct Consumer Spending, Jobs, Wages And Taxes

Almost \$75 million were spent in Ontario by visitors on the trips or excursions that brought them to the Barnes Exhibit (direct consumer spending). This \$75 million in expenditures created ripple effects throughout Ontario's economy that stimulated the production of \$137 million of goods and services (value added).¹²

Table 1

The Economic Impacts Of The Barnes Exhibit At The Art Gallery Of Ontario		
	Gross Impacts	Incremental Impacts
	On the trip that included the visit to the Barnes Exhibit	Solely because the Barnes Exhibit was at the Art Gallery of Ontario
Net Economic Activity (value added)	\$136,800,000	\$70,600,000
Employment (person years)	2,100	1,070
Wages & Salaries	\$97,800,000	\$50,600,000
Federal Taxes	\$25,000,000	\$12,900,000
Provincial Taxes	\$12,500,000	\$6,500,000
Municipal Taxes	\$4,100,000	\$2,200,000
Expenditure Impacts (consumer spending)	\$74,800,000	\$38,200,000

Source: Econometric Research Limited, tables 5, 6. Figures have been rounded to the nearest 100,000 .

Over 2,000 jobs (person years of employment) were required to produce the \$137 million of output. These jobs, in turn, generated \$98 million in wages and salaries within Ontario.

A total of \$42 million in federal, provincial and municipal taxes was generated. Ontario's share of total taxes was more than \$12 million. Federal taxes exceeded \$25 million and municipalities throughout Ontario received more than \$4 million in taxes.

D. Economic Activity Attributable To The Barnes Exhibit

2. Incremental Value Added, Direct Consumer Spending, Jobs, Wages And Taxes

Out-of-town visitors who went to the Barnes Exhibit were in Toronto for a variety of reasons some came to the city on business trips or to visit friends and relatives and only incidentally visited the Barnes Exhibit. Others came primarily or solely to see the Barnes Exhibit. Local residents might have spent their recreation and entertainment money on other events in Ontario, if the Barnes Exhibit had not been available.

To arrive at the economic impact that was generated by the Barnes Exhibit itself, it was necessary to separate the economic activity that would have occurred even if the Barnes Exhibit had not been in Toronto (e.g., the business trip would still have taken place) from the activity that was directly associated with the Barnes Exhibit. These adjustments, in accordance with the level of influence the Barnes Exhibit had in motivating the trip for out-of-town visitors and/or local residents' decision to take part in a cultural activity, were made in estimating the incremental economic activity in the province generated by the Barnes Exhibit.

Approximately one-half of all spending done by people who visited the Barnes Exhibit, or \$38 million, occurred *solely* because the Barnes Exhibit was showing at the Art Gallery of Ontario.¹³ In other words, if the Barnes Exhibit had not been at the Art Gallery of Ontario, the province would not have enjoyed the economic benefits in jobs, wages and salaries, and in tax revenues created by \$38 million in direct consumer spending.

The \$38 million in consumer spending created ripple effects through Ontario's economy stimulating the production of \$71 million of goods and services (value added) directly attributable to the Barnes Exhibit.

Almost 1,100 person years of employment were required to produce the \$71 million in goods and services directly associated with the Barnes Exhibit. This employment yielded wages and salaries in Ontario of close to \$51 million.

Taxes directly associated with the Barnes Exhibit totalled almost \$22 million for the three levels of government, combined. Ontario's share of the tax bill was approximately \$6.5 million. Federal taxes approached \$13 million, and municipalities in Ontario received more than \$2 million in tax revenue because of the Barnes Exhibit.

3. Direct And Indirect Incremental Impacts

Direct, indirect and induced impacts¹⁴ attributable to the Barnes Exhibit are displayed in Table 2. More than one-quarter of the total incremental economic activity associated with the Barnes Exhibits fifteen week run at the Art Gallery of Ontario was generated by the sectors that catered directly to the needs of Barnes Exhibit visitors.

Direct employment impacts associated with the Barnes Exhibit represent more than 40% of all employment years whereas direct wages and salaries represent a considerably smaller percentage (25%). The differential between direct and indirect employment and wages likely reflects different wage structures between the service industries that are ~~direct~~ beneficiaries of tourism spending (e.g., restaurant and hotel service staff) and the wage structures of distribution and manufacturing sectors which are the indirect beneficiaries of tourism activity.

Table 2

Incremental Economic Impacts Of The Barnes Exhibit At The Art Gallery Of Ontario: Direct & Indirect			
	Incremental Impacts		
	Total	Direct	Indirect/Induced
Net Economic Activity (value added)	\$70,600,000	\$19,500,000	\$51,100,000
Employment (person years)	1,070	440	630
Wages & Salaries	\$50,600,00	\$12,800,000	\$37,800,000
Source: Econometric Research Limited, table 5. Figures have been rounded to the nearest 100,000. In other documents, total employment in person yeas is reported as 1,100 because the figure was rounded to the nearest 100.			

4. Employment By Sector

The gross and incremental impacts of the Barnes Exhibit across all sectors of the economy are evident in the ~~jobs~~ required to support the economic activity spawned by the Exhibit. In light of the types of goods and services consumed by

Table 3

Comparison of Employment Impacts by Sector (Per 100 Years)		
Sectors	Gross Impacts #	Incremental Impacts #
Agriculture	103.0	55.8
Forestry	2.7	1.4
Fishing and Trapping	0.7	0.3
Mining	2.1	0.9
Primary Industries	108.5	58.4
Food and Beverages	126.8	67.9
Textiles	5.8	2.7
Knitting and Clothing	11.0	4.6
Wood and Wood Products	1.6	0.9
Furniture and Fixtures	3.4	1.8
Paper and Paper Products	12.3	6.4
Printing and Publishing	26.2	13.6
Primary Metals	5.6	2.7
Metal Fabricating	15.0	7.4
Machinery and Equipment	4.2	2.1
Transportation Equipment	7.4	3.6
Electrical Products	8.2	4.2
Non-Metallic Minerals	3.7	2.0
Petroleum Products	4.6	2.3
Chemical Products	12.5	6.2
Misc. Manufacturing	47.1	20.6
Manufacturing Industries	295.4	149.0
Construction	14.3	7.0
Utilities	272.4	105.8
Trade and Finance	356.3	201.0
Other Services	1,052.3	548.6
Services	1,408.6	749.6
Total	2,100.0	1,070.0

Barnes Exhibit visitors while on their trip or excursion in Ontario, it is not surprising that the majority of **1,408 jobs** created to support all trip/excursion spending and the spending that is directly associated with the Barnes Exhibit is in the **service** sector. Approximately 70% (746) of the person years of employment that are directly associated with the Barnes Exhibit (1064) fall within this sector, including waiters, cleaning and custodial staff, cooks, maintenance staff, desk clerks, and the like.

Other sectors that benefited substantively from the Barnes Exhibit include **manufacturing** (148 **148 jobs**), **utilities** (105 **105 jobs**) and **primary industries** such as agriculture, forestry, and mining. Almost 60 **60 jobs** in the primary industry sector were a direct result of the Barnes Exhibit.

5. Distribution Of Incremental Impacts Across The Province

Even though the Barnes Exhibit took place in Metropolitan Toronto, other parts of the province derived substantial economic benefit from it. In fact, more than one-third of the economic activity in Ontario directly associated with the exhibit took place outside Metropolitan Toronto despite the high concentration of consumer spending (95%) in Metro Toronto.

Of the \$71 million in economic activity directly associated with the Barnes Exhibit, \$27 million benefited Ontario's economic sectors located outside Metropolitan Toronto. The remaining \$44 million are associated with businesses in Metropolitan Toronto.

About one-third of the jobs and wages required to sustain the consumer spending that took place solely because of the Barnes Exhibit, and an even higher proportion of municipal taxes (41%) went to parts of Ontario outside Metro Toronto.

Table 4

Distribution Of Incremental Impacts Across The Province		
	Metro Toronto	Rest of Ontario
Expenditure Impacts (consumer spending)	95%	5%
Net Economic Activity (value added)	62%	38%
Employment (person years)	64%	36%
Wages & Salaries	63%	37%
Municipal Taxes	59%	41%
Source: Econometric Research Limited, table 5.		

6. Sources Of Consumer Spending In Ontario

The Barnes Exhibit resulted in substantial exports. Forty percent (40%) of the \$38 million in consumer spending that occurred in Ontario *solely* because of the Barnes Exhibit at the AGO was done by people who live *outside* Ontario. The Barnes Exhibit generated more than \$15 million in consumer spending from outside the province.

Table 5

Sources Of Consumer Spending In Ontario				
	Gross Expenditure Impacts		Incremental Expenditure Impacts	
	On the trip that included the visit to the Barnes Exhibit		Consumer spending solely because the Barnes Exhibit was at the Art Gallery of Ontario	
	\$74,800,000		\$38,200,000	
Place of Residence	\$	%	\$	%
Ontario	\$31,400,000	42	\$22,800,000	60
Outside Ontario	\$43,400,000	58	\$15,400,000	40
Other Canadian Provinces	\$15,800,000	22	\$7,100,000	18
USA	\$17,500,000	23	\$7,500,000	20
Other Countries	\$10,100,000	13	\$800,000	2
Source: Research Resolutions Detailed Tables, Volume I, page 230 and special calculations undertaken by MCTR based on data supplied by the AGO for non-general admission visitors. Figures have been rounded to the nearest 100,000. Unweighted base = 1,595.				

The exhibit induced about \$7.5 million in spending within the province by visitors from the USA, a further \$7.1 million from residents of other Canadian provinces and just under \$1 million from residents of other countries. Ontario residents spent \$23 million in their province because the exhibit took place.

7. Sources Of Incremental Economic Impacts In Ontario

Consumer spending by residents of Ontario sparked approximately \$42 million in economic activity in the province solely because the Barnes Exhibit was at the Art Gallery of Ontario. A further \$13 million in economic activity was prompted by visitors from other Canadian provinces and slightly more was generated by the spending activity of residents of the USA (\$14 million).

Approximately three times as many jobs were required to meet the incremental or net economic activity generated by Ontarians (640) as by visitors from other domestic locations (200) or the USA (220). Ontarians visiting the Barnes Exhibit were also instrumental in generating \$30 million in wages and salaries about three times the wage levels sparked by visitors from other parts of Canada or the USA. However, on a relative scale, USA visitors had a higher employment impact than did Canadians. For example, it took \$34,000 of consumer spending by USA visitors to create one job, while it took \$36,000 in consumer spending by Ontario residents to generate one job.

Table 6

Sources of incremental Economic Impacts Of The Barnes Exhibit At The Art Gallery Of Ontario				
Incremental Impacts				
	Ontario	Other Canada	USA	Other Countries
Net Economic Activity (value added)	\$42,400,000	\$13,300,000	\$14,000,000	\$1,500,000
Employment (person years)	640	200	220	24
Wages & Salaries	\$30,400,000	\$9,500,000	\$10,100,000	\$1,100,000
Federal Taxes	\$7,800,000	\$2,400,000	\$2,500,000	\$300,000
Provincial Taxes	\$3,900,000	\$1,200,000	\$1,200,000	\$100,000
Municipal Taxes	\$1,300,000	\$400,000	\$400,000	\$50,000
Expenditure Impacts (consumer spending)	\$23,000,000	\$7,100,000	\$7,500,000	\$800,000
Source: Econometric Research Limited, table 13. Figures have been rounded to the nearest 100,000. Rows do not necessarily add to total for each category because of rounding.				

More than \$1 million in provincial tax revenues directly associated with the Barnes Exhibit came into Ontario's tax coffers from other provinces and the same amount came from the USA (\$1.2 million). Most of the remaining provincial tax revenues derived from spending done by Ontario residents (\$3.9 million).

Research Resolutions

8. Categories Of Consumer Spending In Ontario

Many sectors of the economy benefited from the Barnes Exhibit. As a direct result, over \$12 million were spent on food and beverages, primarily in restaurants and bars in Ontario¹⁵. The retail sector enjoyed \$8.5 million in purchases of souvenirs, clothing and other goods.

Table 7

Categories Of Consumer Spending In Ontario				
	Gross Expenditure Impacts		Incremental Expenditure Impacts	
	On the trip that included the visit to the Barnes Exhibit		Consumer spending solely because the Barnes Exhibit was at the Art Gallery of Ontario	
	\$74,800,000		\$38,200,000	
Category of Expense	\$	%	\$	%
Accommodation	\$13,200,00	18	\$4,800,000	13
Food, drinks & groceries	\$21,800,000	29	\$12,200,000	32
Auto Expenses & bus/train/air fares in Ontario	\$9,900,000	13	\$2,300,000	6
Parking, taxis & public transit	\$2,700,000	4	\$1,400,000	4
Recreation & entertainment	\$10,400,000	14	\$7,700,000	20
Shopping	\$13,500,000	18	\$8,500,000	22
Other	\$3,300,000	4	\$1,300,000	3
Source: Research Resolutions Detailed Tables, Volume I, pages 251/258 and special calculations undertaken by MCTR based on data supplied by the AGO for non-general admission visitors. Figures have been rounded to the nearest 100,000. Unweighted base = 1,595.				

Entertainment and recreation facilities, including the Art Gallery of Ontario, other cultural events and institutions, and movie theatres, had receipts of \$7.7 million because the Barnes Exhibit was in Toronto. Hotels and other forms of commercial accommodation sold about \$5 million in lodging because of the Barnes Exhibit.

IV. Barnes Exhibit Visitor Characteristics

D. Visitor Profile

9. Visitor Origin

Almost 600,000 visitors came to the Barnes Exhibit during the fifteen weeks it was open at the Art Gallery of Ontario in Toronto, Ontario. Just under one-half of these visitors, or 284,000 lived in the Metropolitan Toronto area or were in Toronto on a regular commuting trip for work or school. Almost 200,000 visitors from outside Toronto were residents of other parts of Ontario, 52,000 came from other Canadian provinces most notably, Quebec (35,400), and almost 53,000 were residents of the USA. The Barnes Exhibit also attracted approximately 12,400 visitors from other countries.

Table 8

Origin Of Barnes Exhibit Visitors		
Place of Residence	Total Visitors	
	597,300	
	#	%
Local Residents ¹⁶	284,000	48
Other Ontario	196,000	33
Quebec	35,400	6
Other Canadian Provinces	16,600	3
USA	52,900	9
Other Countries	12,400	2
Source: Research Resolutions Detailed Tables, Volume II, page 1 and special calculations by MCTR based on non-general admission visitor information provided by the AGO. Figures have been rounded to the nearest 100.		

The figures provided in Table 8 include all visitors to the Barnes Exhibit - general admission visitors who were captured in the survey process, guests at corporate sponsored events held in conjunction with the Exhibit, school groups and other special groups.

All economic impact estimates take the full visitor population and their corresponding spending into account, but survey data were projected only to the volume of general admission visitors who had a chance to be included in the survey. The general admission population, based on figures provided by the Art Gallery of Ontario, is estimated to be approximately 499,230 visitors. These visitors represent approximately 217,200 separate household units. On average, 1.4 members of the same household visited the Barnes Exhibit (household party size).

10. Visitor Origin: Cities And States

Visitors to the Barnes Exhibit came from across the continent and around the globe. Approximately 4-in-10 Barnes Exhibit live in Metropolitan Toronto (City of Toronto and five boroughs, Census Division #20), and a further 1-in-6 live in the greater Toronto area. Almost one-quarter of the visitors who came to the exhibit live in other parts of Ontario, including 1-in-20 who came from Ottawa the province's second largest city.

Table 9

Place of Residence ¹		
	Barnes Exhibit Household Visitor Parties ¹	Barnes Exhibit Visitors ²
Unweighted	1595	1595
Weighted	217,213	499,234
	%	%
Ontario	76	77
Toronto & Surrounding Area	54	54
Toronto (Census Division #20)	41	38
Suburban Toronto	13	16
Other Ontario	22	23
Ottawa	5	5
London	2	2
Kingston	1	2
Quebec	7	7
Montreal	6	6
Other Canada	5	3
British Columbia	3	2
USA	10	10
New York State	4	5
Michigan	2	2
Other Countries	3	2
Germany	1	1
United Kingdom	1	1

¹Reported by adult in general admission visitor party who did most trip planning and was best able to report on party expenditures.

² General admission visitors to the Barnes Exhibit. Source: Detailed Tabulations, Volume II, pages 1/67.

Almost all Quebecers who came to the Barnes Exhibit live in Montreal (6%). Other provinces represented among visitors include British Columbia, Alberta, Saskatchewan and Manitoba to the west, and Nova Scotia and Newfoundland to the east.

Three percent of Barnes Exhibit visitors came from USA states *beyond* Ontario's traditional feeder markets of New York, Michigan, Pennsylvania and Ohio. The most important feeder markets from the USA include New York State (5%) and Michigan (2%). Together, these border states account for 70% of visitors from the USA.

Visitors also came from countries around the globe Germany, the United Kingdom, France, Italy, Switzerland, Sweden, Denmark, Japan, and Australia/ New Zealand were all represented among Barnes visitors.

11. Demographic Profile Of Barnes Exhibit Visitors: Age And Gender

The *typical* Barnes Exhibit visitor is a woman in her mid-forties. Two-thirds of all visitor parties were represented by women and one-third of the household units that came to the exhibit were represented by men. This predominance of women in the visitor population, although more extreme among Barnes visitors, is consistent with other tourism data available on the demographic profile of Canadian cultural visitors as a whole.¹⁷

Table 10

	All Barnes Exhibit Visitors	Origin					
		Total Ontario	Toronto ²	Other Ontario	Quebec	USA	Total Non-Domestic
Household Visitor Parties Unweighted	1595	874	495	379	260	315	375
Weighted Parties	217,213 %	164,978 %	97,002 %	67,976 %	15,197 %	20,609 %	27,033 %
GENDER							
Male	32	32	33	30	29	31	32
Female	68	68	67	70	71	69	68
AGE OF RESPONDENT							
15 - 19 years	1	2	2	1	-	*	1
20 - 34 years	32	35	38	30	18	15	23
35 - 44 years	21	20	20	21	26	20	21
45 - 54 years	21	20	19	22	25	29	26
55 - 64 years	13	13	13	12	17	18	15
65 years or more	11	10	7	14	13	10	18
Average age	44	43	42	44	48	50	47
¹ Reported by adult in general admission visitor party who did most trip planning and was best able to report on party expenditures. ² Toronto includes Census Division 20 and other suburban areas and visitors who claimed to be commuting to work or school. *Less than 0.5%. Source: Detailed Tabulations, Volume II, pages 221, 222.							

One-third of the event's visitors were young adults between the ages of 20 and 34, one-fifth fell into the 35 to 44 year age group, and the same proportion were between 45 and 54 years of age. Older visitors those 55 years of age or over constituted approximately one-quarter of the visitor base.

The gender profile of Barnes Exhibit visitor party representatives holds constant across all origin groups examined, but visitors from Quebec and the USA tend to be older than those from Ontario. The average age of the Ontario visitor is 43 years, climbs to 48 years among Quebecers, and to 50 among Americans.

12. Demographic Profile Of Barnes Exhibit Visitors: Education And Household Income

The Barnes Exhibit visitor is well-educated and relatively affluent. Two-thirds have completed university a proportion that is more than five times the Canadian national average.¹⁸

Table 11

Household Income, Origin of Visitors (Reported)							
	All Barnes Exhibit Visitors	Origin					
		Total Ontario	Toronto ²	Other Ontario	Quebec	USA	Total Non- Do- mestic
Household Visitor Parties	1595	874	495	379	260	315	375
Unweighted Weighted Parties	217,213 %	164,978 %	97,002 %	67,976 %	15,197 %	20,609 %	27,033 %
EDUCATION							
Graduated Secondary or Less	9	10	10	10	9	5	7
Courses at Community College/Some University	24	26	25	26	21	14	15
Graduated University/Post Graduate	67	64	65	64	70	81	78
ANNUAL HOUSEHOLD INCOME							
Under \$40,000	25	25	29	21	20	16	15
\$40,000 - \$59,999	20	20	20	20	27	18	17
\$60,000 - \$99,999	28	29	26	32	28	30	29
\$100,000 Or More	19	17	17	18	19	26	26
Don't Know/Not Stated	9	9	8	10	6	10	13
¹ Reported by adult in general admission visitor party who did most trip planning and was best able to report on party expenditures. ² Toronto includes Census Division 20 and other suburban areas and visitors who claimed to be commuting to work or school. All incomes are reported in Canadian currency. Source: Detailed Tabulations, Volume II, pages 1060, 1078, 1079.							

Consistent with higher levels of formal education, Barnes Exhibit visitors have comparatively high household incomes. One-fifth of the households represented by Barnes Exhibit visitors had annual incomes of at least \$100,000 and a further one-quarter had incomes in the \$60,000 - \$99,999 range. In contrast, only about one-fifth of Canadians had 1992 household incomes of at least \$60,000. Con-versely, more than one-half of Canadians have household incomes of \$40,000 or *less*, but only one-quarter of Barnes Exhibit do.¹⁹

Not surprisingly, lower income levels are evident for people in the local vicinity almost 1-in-2 Torontonians report incomes of less than \$60,000 and higher income levels are reported for visitors who travelled greater distances to reach Toronto. Americans who came to the exhibit are especially likely to be affluent: more than 1-in-4 have annual household incomes of at least \$100,000 (CND).

E. Trip Characteristics

13. Main Purpose Of Trip

Two-thirds of out-of-town visitors took the trip that included a visit to the Barnes Exhibit *specifically to attend the Barnes Exhibit*. Other trip motivations included visiting friends and relatives (12%), business (10%), and other pleasure pursuits (5%).

Table 12

	Total Non- Local Visitors	Origin				
		Ontario, Outside Toronto	Quebec	Other Canada	USA	Other Country
Out-of-Town Household Visitor Parties Unweighted	1,100	379	260	86 ²	315	60 ²
Weighted Out-of-Town Visitor	289,199 %	174,844 %	34,647 %	16,096 %	51,647 %	11,966 %
Specifically to attend the Barnes Exhibit	66	80	67	12	51	7
Holiday or vacation	5	1	3	10	12	37
Visit friends & relatives	12	8	16	37	12	21
Business/going to work or school	10	6	9	31	14	35
To attend other events or attractions	5	4	3	10	11	-
Some other reason	1	1	1	-	*	-
¹ Reported by adult in general admission visitor party who did most trip planning and was best able to report on party expenditures.						
² Caution: small base size. *Less than 0.5%. Source: Detailed Tabulations, Volume II, pages 241/243.						

Provincial residents from outside Toronto are most likely to have taken the trip especially to see the special exhibit at the AGO (80%). Two-thirds of the Quebecers and one-half of the Americans who came to the Barnes Exhibit took the trip primarily because of it. Most Canadians from other provinces and residents of countries outside North America were not travelling specifically to see the Barnes Exhibit. Instead, they were travelling primarily to see friends and relatives, for business and/or for more general pleasure purposes.

14. Level Of Influence The Barnes Exhibit Had On Trip Decision

Regardless of the main purpose of the trip that brought a visitor to the Art Gallery of Ontario and the Barnes Exhibit, the exhibit could have had some influence on the decision to visit Toronto. To capture the visitor's estimate of this influence, out-of-towners were asked to indicate how much influence, if any, the Barnes Exhibit had in determining their choice of Toronto as a stop or destination on their trip, using a scale ranging from zero (no influence) to ten (single main reason for stop in Toronto). Not only do responses to this question provide guidance on the motivation for the stop in Toronto, but they were also instrumental in determining the level of consumer spending that was deemed attributable to the Barnes Exhibit (see Chapters II and III).

Slightly fewer out-of-town visitors stated that the Barnes Exhibit was the single main reason (10) for their stop in Toronto (59%) than indicated that the Exhibit was the main purpose for their entire trip (66%, see previous section). At the same time, three-quarters of these visitors claimed that the exhibit had a major influence (10, 9, 8), and a further 1-in-8 (13%) claim that it had a moderate influence (4/7). One-fifth of all out-of-town visitors said that they would have stopped in Toronto irrespective of the Barnes Exhibit (0 influence).

Residents of Ontario who live outside Toronto (77%), followed by those who live in Quebec (69%), were the most likely to ascribe a high level of influence to the Barnes Exhibit for their stop in Toronto. Approximately one-half of the American visitors at the exhibit credited it with major influence in their decision to come to Toronto, whereas very few visitors from other Canadian provinces (13%) and none of the foreign visitors at the exhibit did so.

Table 13

Influencing party in the general admission visitor party who did most trip planning and was best able to report on party expenditures. Eleven-point scale ranging from 1/0 as the single main reason to 10/0 as no influence at all.						
		Origin				
	Total Non-Local Visitors	Ontario, Outside Toronto	Quebec	Other Canada	USA	Other Country
Out-of-Town Household Visitor Parties Unweighted	1,100	379	260	86 ²	315	60 ²
Weighted Visitors	289,199 %	174,844 %	34,647 %	16,096 %	51,647 %	11,966 %
Major influence (8, 9, 10)	65	77	69	13	51	-
Moderate influence (4,5,6,7)	13	10	14	18	18	13
Minor/no influence (0,1,2,3)	23	13	17	69	31	87
Single Main Reason (10)	59	73	61	11	42	-
No Influence At All (0)	20	10	14	65	28	84
Average influence	6.8	8.0	7.3	2.1	5.8	1.0
Median influence	10	10	10	0	7	0
¹ Reported by adult in the general admission visitor party who did most trip planning and was best able to report on party expenditures. Eleven-point scale ranging from 1/0 as the single main reason to 10/0 as no influence at all. ² Caution: small base size. Source: Detailed Tabulations, Volume II, pages 277/279.						

15. Main Destination Of The Trip

Regardless of their reason for taking it, or the amount of influence the Barnes Exhibit had on the decision to stop in Toronto, almost all visitors to the exhibit had Toronto as their main destination for the trip.

Residents of provinces other than Ontario and Quebec were somewhat more likely than other Canadian visitors to have had another destination in Ontario as their goal (8%) or were heading for a location in the USA (5%) on the trip that brought them to the Barnes Exhibit. Visitors from outside North America were

Table 14

Main Destination Of Trip (as indicated by visitor to the Barnes Exhibit)						
	Origin					
	Total Non-Local Visitors	Ontario, Outside Toronto	Quebec	Other Canada	USA	Other Country
Household Visitor Parties	1,100	379	260	86 ²	315	60 ²
Unweighted						
Weighted	289,199	174,844	34,647	16,096	51,647	11,966
Visitors	%	%	%	%	%	%
Toronto	95	97	93	86	95	75
Some other location in Ontario	3	2	6	8	3	3
Quebec	*	*	1	1	*	4
Some other location in Canada	1	*	-	-	-	11
USA	1	*	1	5	2	6

¹Reported by adult in the general admission visitor party who did most trip planning and was best able to report on party expenditures. ²Caution: small base size. *Less than 0.5%. Source: Detailed Tabulations, Volume II, pages 433/435.

least likely to consider Toronto their main destination on the trip (75%). Approximately one-tenth of these off-shore visitors were destined for other locations in Canada (excluding Ontario and Quebec) and one-twentieth had a main destination in the USA.

F. Nights And Accommodation On The Trip

Table 15

Nights And Accommodation On The Trip	
--------------------------------------	--

		Origin				
	Total Non- Local Visitors	Ontario, Outside Toronto	Quebec	Other Canada	USA	Other Country
Household Visitor Parties Unweighted	1,100	379	260	86 ²	315	60 ²
Weighted Visitor Parties	120,211 %	67,976 %	15,197 %	10,005 %	20,609 %	6,424 %
On Trip (Any Location)						
None (Same- day trip)	41	65	7	-	17	-
One night	11	10	19	1	19	-
Two nights	12	8	26	8	18	4
Three nights	10	7	24	3	16	-
Four nights	8	5	10	22	11	7
More than four nights	18	5	14	66	21	89
Average number of nights						
<i>All visitors</i>	3.3	1.0	3.1	8.7	3.9	18.0
<i>Overnight visitors</i>	5.6	3.0	3.3	8.7	4.7	18.0
Median	3	2	3	7	3	10
¹ Reported by adult in the general admission visitor party who did most trip planning and was best able to report on party expenditures. ² Caution: small base size. Source: Detailed Tabulations, Volume II, pages 471/476.						

Research Resolutions

16. Nights Spent On Trip By Out-of-Town Visitors

For more than half of the Barnes Exhibit out-of-town visitors, the trip that brought them to Toronto and to the Barnes Exhibit was an *overnight* trip (59%). The remaining visitors came to the Barnes Exhibit on a *same-day* trip (41%). In light of the distances that had to be travelled between ~~Ahome~~ and Toronto, it is not surprising that Ontario residents were most apt to have completed their ~~ABarnes trip~~ in the same-day (65%) or that residents of Canadian provinces outside Ontario and Quebec and those from off-shore countries were on overnight trips when they took in the Barnes Exhibit in Toronto. Approximately 1-in-6 Americans completed the trip that brought them to the Barnes Exhibit during a single day (17%), and even fewer Quebecers (7%) confined their Barnes Exhibit trip to a single day.

On average, the trip that brought the visitor to the Barnes Exhibit involved three nights away from home for *overnight visitors* from Ontario and Quebec, and considerably longer among overnight visitors from other Canadian provinces (8.7 nights). American visitors who spent any nights away from home tended to be away for almost 5 nights whereas travellers from other countries were on considerably longer trips averaging 18 nights.

17. Nights Spent In Ontario

Most, but not all of the nights spent on the trip that included a visit to the Barnes Exhibit were spent in Ontario. Of the 399,816 party nights spent by out-of-town Barnes Exhibit visitors, 328,047 were spent in the province. Because such a high proportion of trips had a main destination in Toronto, it is not surprising that the average number of nights spent on an overnight trip (5.6) corresponds closely to the average number of nights spent in Ontario (4.6) by out-of-town visitors.

Table 16

Nights Spent In Ontario ¹						
	Origin					
	Total Non- Local Visitors	Ontario, Outside Toronto	Quebec	Other Canada	USA	Other Country
Out-of-town Household Visitor Parties Unweighted	1,100	379	260	86 ²	315	60 ²
Weighted Out-of-town Visitor Parties	120,211 %	67,976 %	15,197 %	10,005 %	20,609 %	6,424 %
In Ontario						
No nights in Ontario	41	66	7	-	17	-
Total Nights In Ontario ³	328,047	65,925	46,108	67,611	64,133	84,271
One night	12	10	20	3	19	-
Two nights	13	9	26	10	22	6
Three nights	10	6	24	5	18	8
Four nights	8	5	11	24	10	6
More than four nights	16	5	12	58	15	81
Average number of nights						
<i>All visitors</i>	2.7	1.0	3.0	6.8	3.1	13.1
<i>Spent nights in Ontario</i>	4.6	2.8	3.3	6.8	3.7	13.1
Median (overnight visitors)	3	2	3	6	3	8

¹ Reported by adult in the general admission visitor party who did most trip planning and was best able to report on party expenditures. ² Caution: small base size. ³ Person nights. Source: Detailed Tabulations, Volume II, pages 471/476.

On average, the overnight trip that brought the involved almost three nights away from home. Overnight visitors from other Canadian provinces spent close to 4 nights in the province, while overnight trip spent considerably longer averaging 13 nights.

Table 17

Nights Spent in Ontario		
	Total Non-Local Visitors	To See Barnes Exhibits
Out-of-town Household Visitor Parties Unweighted	1,100	616
Weighted Out-of-town Visitor Parties	120,211 %	72,756 %
No nights in Ontario	41	62
Total Nights In Ontario ³	328,047	83,888
Average number of nights		
<i>All visitors</i>	2.7	1.2
<i>Spent nights in Ontario</i>	4.6	3.1
<i>Median (overnight visitors)</i>	3	2

¹ Reported by adult in the general admission visitor party report on party expenditures. ² Caution: small base. ³ Volume II, pages 471/476.

Ontarian or Quebecker to the Barnes Exhibit in Ontario but was considerably longer among Americans (6.8 nights). American visitors on an average stay longer than visitors from other countries

By Non-Local Visitors ¹			
Main Purpose of Trip			
	Visit Friends/Relatives	Other Pleasure	Business
	169	141	160
	15,480 %	12,364 %	18,155 %
	5	9	7
	87,169	51,835	92,660
	5.6	4.2	5.1
	6.0	4.6	5.5
	4	4	4
Party who did most trip planning and was best able to size. ³ Person nights. Source: Detailed Tabulations,			

Another way of looking at the same findings suggests that although they account for over sixty percent of all out-of-town visitors, those who came specifically for the purpose of seeing the Barnes Exhibit account for only about one-quarter (83,888) of the nights spent in Ontario on trips that included a visit to the Barnes Exhibit (328,047).

It is important to note that more than 6-in-10 of the non-local visitors who took the trip with the expressed purpose of seeing the Barnes Exhibit spent *no* nights in Ontario. Not only were they less likely to spend *any* nights in the province, but overnight visitors motivated by the Barnes Exhibit spent fewer nights in the province (3.1) than did overnight visitor parties who were motivated by visiting friends or family (6.0), other pleasure purposes (4.6) or business (5.5).

18. Accommodation Used In Ontario

Commercial accommodation was widely used by overnight visitors to the Barnes Exhibit. Almost 6-in-10 visitor parties who spent any nights in the province spent at least one of these nights at a hotel, motel, bed & breakfast and/or resort or lodge. Within the commercial accommodation sector, hotels were the most popular one-half of all overnight visitor parties spent at least a night in one.

Overnight visitors from the USA were most likely to rely on hotel accommodation in Ontario (79%), followed by visitors from Quebec (55%). Even though more than one-half of the overnight visitor parties from Ontario stayed with friends and relatives (59%), 4-in-10 of these parties spent at least one night in a hotel within the province (43%).

Table 18

	Total Non-Local Visitor Parties (Overnight)	Origin				
		Ontario, Outside Toronto	Quebec	Other Canada	USA	Other Country
Household Visitor Parties (Overnight)	793	128	247	86 ²	272	60 ²
Unweighted						
Weighted	120,211	23,208	14,180	10,005	17,166	6,424
Overnight Visitor Parties (Ontario)	%	%	%	%	%	%
Hotel	53	43	55	39	79	37
Motel	3	1	6	-	5	7
Bed & Breakfast	2	3	2	2	1	-
Home of friends/relatives	46	59	41	67	17	51
Any Commercial ³	57	46	61	41	82	46
Any Non-Commercial ⁴	48	62	44	67	19	57

¹Reported by adult in the general admission visitor party who did most trip planning and was best able to report on party expenditures. ² Caution: small base size. ³ Commercial includes hotel, motel, camping, commercial cottage/cabin, bed & breakfast and resort/lodge. ⁴ Non-commercial includes home of friends/relatives, private cottage and other. Source: Detailed Tabulations, Volume II, pages 759/760. Percentages add to more than 100% because multiple types of accommodation were used.

19. Room Nights In Ontario

Barnes Exhibit visitors who stayed overnight in Ontario were asked to identify which type(s) of accommodation they used while in the province and the number of nights they spent in each type. This information, when tabulated by household visitor parties, provides an approximation of room nights in various types of accommodation in the province (assuming that each household party required one room per night).

Table 19

		Origin				
	All Origins	Ontario, Outside Toronto	Quebec	Other Canada	USA	Other Country
Household Visitor Parties	1,595	379	260	86 ²	315	60 ²
Unweighted						
Weighted Visitor Parties	217,213	67,976	15,197	10,005	20,609	6,424
ARoom# Nights In Ontario Total	# 328,047	# 65,925	# 46,108	# 67,611	# 64,133	# 84,271
Hotel	106,312	21,160	16,479	17,290	38,312	13,071
Other Commercial ³	14,272	2,107	2,160	2,823	2,865	4,317
Any Non- Commercial ⁴	207,463	42,658	27,469	47,498	22,956	66,883

¹Reported by adult in the general admission visitor party who did most trip planning and was best able to report on party expenditures. ² Caution: small base size. ³ Other commercial includes motel, camping, commercial cottage/cabin, bed & breakfast and resort/lodge. ⁴ Non-commercial includes home of friends/relatives, private cottage and other. Source: Detailed Tabulations, Volume II, pages 454, 826/828.

More than one-third of the room nights spent in Ontario by Barnes Exhibit visitors were spent in commercial forms of accommodation. Hotels would have booked approximately 106,300 rooms; and other paid accommodations, such as motels, bed & breakfasts and resorts/lodges would have registered a further 14,300 visitor groups who were on trips that included a visit to the Barnes Exhibit.

The impact of out-of-province visitors on the hotel sector is clearly evident when the proportion of visitor parties from different locations is contrasted with the proportion of hotel room nights purchased throughout Ontario by people who visited the Barnes Exhibit. While fewer than one-fifth of all visitor parties at the Barnes Exhibit came from the USA, approximately one-third of all hotel nights booked by Barnes Exhibit visitors in Ontario were sold to American visitors. In contrast, more than one-half of the visitor parties at the exhibit were Ontario residents (excluding local) but only one-fifth of the hotel nights used on trips that included a Barnes Exhibit visit were used by provincial residents. The remainder of hotel room nights were about evenly divided among visitors from Quebec, other Canadian provinces, and other countries (see Table 20).

Table 20

	Hotel Room Nights	Out-of-Town Visitor Parties
Weighted	106,312	120,211
Place Of Residence	%	%
Ontario Outside Toronto	20	56
Quebec	16	13
Other Canadian Provinces	16	8
USA	36	17
Other Countries	12	5

Source: Detailed Tables, Volume II, page 826, 247

Of the 106,300 hotel room nights occupied throughout Ontario by people who visited the Barnes Exhibit, more than one-quarter, or about 29,000, were booked by people who took the trip specifically to see the Barnes Exhibit. The majority of room nights, however, were booked on trips that were primarily motivated by business (55,730).

Table 21

	Hotel Room Nights	Out-of-Town Visitor Parties
Weighted	106,312	120,211
Main Purpose Of Trip	%	%
Specifically To See The Barnes Exhibit	27	61
Other Pleasure	15	13
Business	52	10
Visit Friends/Relatives	4	15
Source: Detailed Tables, Volume II, page 834		

20. Hotel Nights In Toronto

More than 9-in-10 of the 106,312 hotel room nights spent in Ontario by Barnes Exhibit visitors were spent in Toronto (100,296). Like hotel bookings province-wide, those made in Toronto were dominated by out-of-province guests, and particularly those from the USA.

Table 22

	Hotel Room Nights	Out-of-town Visitor Parties
Weighted	100,296	120,211
	%	%
Ontario Outside Toronto	20	61
Quebec	15	13
Other Canadian Provinces	15	10
USA	38	15
Other Countries	13	3
Source: Detailed Tables, Volume II, page 922.		

Almost 29,000 room nights booked by Barnes Exhibit visitors in Toronto could be said to have been sold *because* the Barnes Exhibit was in the city. These 29,000 hotel nights correspond to the bookings made by visitors who claim that they took the trip that included the Barnes Exhibit *because* of the exhibit itself.

Table 23

	Hotel Room Nights	Out-of-town Visitor Parties
Weighted	100,296	120,211
	%	%
Specifically to see the Barnes Exhibit	28	61
Other Pleasure	15	13
Business	51	10
Visit Friends/Relatives	4	15
Source: Detailed Tables, Volume II, page 930.		

Only 1-in-100 visitor parties that attended the Barnes Exhibit report *extending* their stay in commercial accommodation in Toronto in order to see the Barnes Exhibit.²⁰

G. *Spending Characteristics Of Barnes Exhibit Visitors*

21. **Average Spending In Ontario**

In total, people who visited the Barnes Exhibit²¹ spent more than \$70 million in Ontario, or an average of \$322 per household party.²²

Local residents, whose spending included Barnes Exhibit tickets, restaurant meals at the AGO, any gifts or souvenirs they purchased at the Gallery, as well as special restaurant meals they would not have had if they had not gone to the Barnes Exhibit, parking and other local transportation fees, spent \$65 per household unit on their excursion.

Table 24

Per Party Spending In Ontario	
	\$
All Visitor Parties	\$322
Local Residents ²³	\$65
Other Ontario	\$311
Quebec	\$495
Other Canadian Provinces	\$805
USA	\$837
Other Countries	\$1,539
Source: Research Resolutions Detailed Tables, Volume I, page 72. All figures are in Canadian dollars. Unweighted base = 1,595.	

Ontario household parties from *outside* Toronto spent more than \$300 on the trip that brought them to the Barnes Exhibit, whereas Quebecers spent almost \$500 per party. Residents of the USA and Canadian provinces other than Ontario and Quebec spent more than \$800 in Ontario per household trip.

The striking differences between provincial residents' and non-residents' spending levels is largely attributable to the length of the trip and the accommodation used: all local visitors and the majority of other Ontario residents completed their trip to the Barnes Exhibit in a single day. They did not, therefore, incur accommodation costs or the additional meals and expenses associated with overnight trips.

Visitors from outside the province, on the other hand, were particularly likely to have spent at least one night in Ontario on the trip that included the Barnes Exhibit, and commonly spent their nights in commercial accommodation.

The impact of hotel accommodation and restaurant meals within the group most likely to utilize these services while on the trip that included a visit to the Barnes Exhibit *business visitors* is clearly evident when average spending of out-of-towners who took a business trip is compared to those who took their trip for the primary reasons of attending the Barnes Exhibit and those who took it for any other reason. The business visitor party spent \$851, on average, in Ontario more than twice the amount spent by out-of-town visitor parties who were in the province specifically to see the Barnes Exhibit (\$331).

Table 25

	Per Party Spending In Ontario
	\$
The Barnes Exhibit	\$331
Business	\$851
Other Purposes	\$592
Source: Research Resolutions Detailed Tables, Volume III, page 1. #Out-of-town# includes Ontarians (excluding those who live in Metropolitan Toronto), Quebecers and Americans. All figures are in Canadian dollars. Unweighted base = 954.	

Out-of-town visitors travelling for any other purpose, including visiting friends and relatives spent an average of \$592 per party within the province.

22. Incidence And Average Spending In Ontario By Category

While on the trip that included a visit to Barnes Exhibit, people with different travel purposes spent money on different categories of expense. Visitors from outside Metropolitan Toronto who were travelling specifically to see the Barnes Exhibit were, for example, considerably less likely than business visitors to spend money on accommodation a finding that likely derives from the greater propensity of business travellers to be on an overnight than same-day trip. Fewer than 1-in-10 business travel visitor parties were on same day trips (7%) whereas almost two-thirds of those who came from outside Toronto specifically to see the Barnes Exhibit completed their trip within a single day (62%).²⁴

Table 26

Average Spending in Ontario By Category				
Household Visitor Parties Unweighted Category of Expense	Total Visitor Parties	Out-of-Towners With . . . Main Purpose		Locals
		Visiting the Barnes Exhibit	Business	
	1,595	616	160	501
	%	%	%	%
Accommodation	18	24	72	*
Restaurants/Bars	94	98	99	67
Food/beverages In grocery stores	40	67	80	*
Operation of private/rented vehicle	61	84	79	34
Vehicle rental fees	17	14	62	*
Cars & train/bus/airline fares in Ontario	38	66	80	*
Parking, taxis & public transit	55	45	91	49
Admissions to cultural events	94	99	98	89
Shopping, gifts, souvenirs	81	93	93	65
*Less than 0.5%. Source: Research Resolutions Detailed Tables, Volume I, page 9.				

Conversely, almost all visitor parties, regardless of purpose, spent money on restaurant meals and admission to cultural events, including the Barnes Exhibit spending categories that are largely unaffected by the length of a visitor's stay in the province. As reflected in their total and average spending in Ontario, *business visitors* are more apt to spend money on almost all categories of expense than are visitors who came to the Barnes Exhibit with any other overall trip purpose.

Average spending per category is shown in two ways: based on the average amounts spent by Barnes Exhibit visitor parties that reported an expenditure for the specific item (*spenders*); and based on all visitor parties, irrespective of their spending pattern (*total*). For example within the *spender* group, only households that paid for accommodation were used to calculate average accommodation expenditure; only those who had parking or local transit costs were used to calculate average spending for this category.

Table 27

Table 27

			Out-of-Towners With . . . Main Purpose					
Household Visitor Parties Unweighted ¹	Total Visitor Parties		Visiting the Barnes Exhibit		Business		Locals	
	1,595		616		112		680	
	Spenders	Total	Spenders	Total	Spenders	Total	Spenders	Total
Accommodation	\$333	\$60	\$209	\$51	\$406	\$272	\$134	\$1
Food, drinks & groceries	\$107	\$90	\$96	\$95	\$237	\$229	\$43	\$32
Cars & train/ bus/airline fares in Ontario	\$51	\$26	\$42	\$38	\$61	\$52	\$26	\$6
Parking, taxis & public transit	\$14	\$411	\$10	\$8	\$34	\$30	\$7	\$6
Recreation & entertainment	\$46	\$43	\$61	\$60	\$58	\$55	\$27	\$25
Shopping	\$73	\$59	\$77	\$73	\$98	\$89	\$35	\$25

¹In the *Spenders* columns, the base for each item changes, depending on the number of household visitor parties that incurred each type of expense. See detailed tables for incidence of spending on each category. Source: Research Resolutions Detailed Tables, Department of Canadian Heritage, Volume D, pages 549/554; MCTR, Volume III, pages 1/6 (for *Business* columns only).

Locals' spending on virtually every category is substantively lower than out-of-towners' spending a function of the shorter distances travelled and the greater likelihood that the trip was completed in a single day by local visitors. Further-more, people who took the trip for the main purpose of *visiting the Barnes Exhibit* spent considerably less than did out-of-towners who took the trip for *business* reasons. This difference is also likely related to the fact that people travelling for business tended to be on longer journeys they spent about five nights in Ontario compared to one night for *Barnes* purpose visitors and were, therefore, more reliant on commercial accommodation and the food/ hospitality services of Ontario than were out-of-towners who came specifically for the Barnes Exhibit.

Those who paid for lodging in Ontario spent \$333, on average, with business out-of-town visitor groups spending considerably more (\$406) than out-of-towners who came specifically for the Barnes Exhibit (\$209). The food and hospitality sector attracted \$107 in consumer spending per *spending* group, including almost \$100 per party from out-of-towners who came primarily for the Barnes Exhibit, and \$43 per party among local residents who used restaurants at the Art Gallery or elsewhere in Toronto on the day of their trip.

On average, spending among shoppers approached \$75, with out-of-towners in Toronto primarily because of the Barnes Exhibit (\$77) outspending local residents (\$35) in the Gallery Shop and other retail establishments in Ontario at a rate of two to one. Business visitors who made any retail purchases spent even more money shopping (\$98) than did those who came specifically to see the Barnes Exhibit.

H. Other Information About Barnes Exhibit Visitors

23. Activities In Ontario

In order to keep the exit survey as short as possible, some topics of interest were included only in the follow-up telephone survey that was undertaken among co-operative out-of-town Barnes Exhibit visitors. The activities engaged in while in the province is one of these topics.

Table 28

Activities Engaged in While in Ontario ¹				
	Total Out-of- Town Visitor Parties	Origin		
		Ontario outside Toronto	Quebec	USA
Household Visitor Parties Unweighted	518	180	174	164
Weighted Parties (Telephone Follow-Up)	51,571 %	31,423 %	10,028 %	10,120 %
Visit a museum or art gallery	100	100	100	100
Shopping	67	65	60	81
Dine at high quality restaurants	47	46	37	60
Visiting friends & relatives	42	42	58	26
Sightseeing	36	25	49	60
Take in nightlife/entertainment	21	18	14	38
Attend cultural performance	20	15	14	42
Visit a historic site	11	8	10	19
Attend festival, fair, exhibition	9	8	6	14
Participate in outdoor sports/ activities	5	5	6	7
Visit a national or provincial park	2	2	4	1
Visit a zoo or natural display	2	2	3	2
Attend aboriginal or native cultural activity	1	1	1	2
Visit a theme park	1	-	2	1
¹ Reported by adult in general admission visitor party who did most trip planning and was best able to report on party expenditures and who responded to the telephone follow-up survey. Source: Detailed Tabulations, Volume II, pages 1125/ 1153 .				

The range of activities engaged in by out-of-town visitors to the Barnes Exhibit is quite broad: two-thirds of the visitor parties went shopping, one-half dined in expensive restaurants, 4-in-10 saw family and friends in Ontario, one-third went sightseeing, one-fifth participated in the province's nightlife and entertainment opportunities, and the same proportion attended a cultural performance in Ontario.

Visitors from the USA were more apt to be found in Ontario's retail establishments likely taking advantage of a very favourable exchange rate than were Ontarians from outside Toronto or Quebecers. Because they were more likely to be staying in commercial accommodation than were other out-of-towners, American visitors were also more likely to eat in high quality restaurants. They also seemed more inclined than Ontarians or Quebecers to engage in the province's nightlife (38%), attend cultural performances (42%) and visit historic sites in Ontario (19%).

Quebeckers were the most apt to combine a trip to the Barnes Exhibit with a visit to friends or relatives in Ontario (58%), and they, like their American counterparts, were more likely to take in the sights of Ontario than were people who live in the province.

24. Pre-Planned Versus Unplanned Activities In Ontario

Everyone who claimed to have participated in an activity while in Ontario was asked whether they had planned this activity *in advance* of the trip or whether it was a spontaneous one, decided upon *on the spur of the moment*. In almost all cases, visits to friends and relatives by those who made such a visit were pre-planned. So too were visits to museums and galleries including the Barnes Exhibit. Approximately 8-in-10 of the out-of-town visitors who attended a cultural performance in Ontario during their *Barnes trip* had planned for this event in advance, whereas somewhat fewer of those who took part in fine restaurant dining, festivals or fairs, and sightseeing had pre-planned these activities.

Table 29

Proportion of out-of-town visitors stating . . . activity was planned before making trip to Toronto among those who engaged in each activity ¹				
	Total Out-of- Town Visitor Parties %	Origin		
		Ontario outside Toronto %	Quebec %	USA %
Visiting friends & relatives	95	93	97	98
Visit a museum or art gallery	93	94	95	87
Attend cultural performance	78	78	79	77
Dine at high quality restaurants	73	77	66	66
Attend festival, fair, exhibition	72	77	89	57
Sightseeing	68	59	77	73
Take in nightlife/entertainment	65	74	58	53
Shopping	61	64	59	54
¹ Reported by adult in general admission visitor party who did most trip planning and was best able to report on party expenditures and who responded to the telephone follow-up survey. Bases for each activity vary by level of participation see Detailed Tabulations. Some base sizes are very small. These data should be interpreted with extreme caution. *Less than 0.5%. Source: Detailed Tabulations, Volume II, pages 1107/ 1133 .				

Interestingly, only 6-in-10 out-of-town shoppers came to Toronto with the *intention* of shopping in Ontario. This finding attests to the importance of impulse buying a phenomenon that seems especially strong among American visitors. Only about one-half of the US visitors who shopped in Ontario *planned* to do so in advance.

25. Previous Visits To Toronto In The Past Five Years

Telephone survey responses by Barnes Exhibit visitors suggest that almost all Ontarians who live outside Toronto had been to the city prior to the trip that included their visit to the Barnes Exhibit. On the other hand, 3-in-10 visitor parties from Quebec (30%) and almost the same proportion from the USA (26%) took in the Barnes Exhibit as part of their *first* trip to Toronto.

Although a relatively small proportion of out-of town visitors were newcomers to Toronto, many more were experiencing the AGO for the first time when they visited the Barnes Exhibit. For almost 1-in-4 Ontarians from outside Toronto, and for more than 1-in-2 Quebecers and Americans, the Barnes Exhibit was their first foray into the Art Gallery of Ontario.

Table 30

Visits To Toronto in Past Five Years ¹ & Newcomers to the AGO				
	Total Out-of-Town Visitor Parties	Origin		
		Ontario outside Toronto	Quebec	USA
Household Visitor Parties	518	180	174	164
Unweighted				
Weighted Parties (Telephone Follow-Up)	51,571	31,423	10,028	10,120
Newcomer To Toronto (Barnes Exhibit was first visit)	13%	4%	30%	26%
Average number of visits in past 5 years	60 visits	95 visits	9 visits	7 visits
Median number of visits in past 5 years	10 visits	31 visits	2 visits	4 visits
Newcomer To The Art Gallery of Ontario	35%	23%	55%	55%
¹ Reported by adult in general admission visitor party who did most trip planning and was best able to report on party expenditures and who responded to the telephone follow-up survey. *Less than 0.5%. Source: Detailed Tabulations, Volume II, pages 1194/ 1195; 1409.				

26. Likelihood Of Returning To Toronto In The Next Two Years

Almost all Ontario resident Barnes Exhibit visitors who live outside Toronto expect to be back in the city within the next two years, about one-half of the Quebecers who came to the Barnes Exhibit have similar plans, and three-quarters of the USA visitors claim to be *very likely* to return to Toronto during this time span.

Table 31

	Total Out-of-Town Visitor Parties	Origin		
		Ontario outside Toronto	Quebec	USA
Household Visitor Parties Unweighted	518	180	174	164
Weighted Parties (Telephone Follow-Up)	51,571 %	31,423 %	10,028 %	10,120 %
Very likely	84	96	55	75
Somewhat likely	8	2	21	17
Not very likely	4	1	13	5
Not at all likely	3	1	11	2
¹ Reported by adult in general admission visitor party who did most trip planning and was best able to report on party expenditures and who responded to the telephone follow-up survey. *Less than 0.5%. Source: Detailed Tabulations, Volume II, pages 1203.				

Among those who were visiting Toronto for the first time, one-third claim to be *very likely* to return within the next two years and a further 1-in-4 believe that they are *somewhat likely* to do so. Interest in returning to Toronto over this time span is considerably more pronounced among first time visitors from the USA (39%, *very*) than among their counterparts in Quebec (24%, *very*).

Table 32

	Total Out-of-Town Visitor Parties	Origin	
		Quebec	USA
Household Visitor Parties Unweighted	100	52 ²	44 ³
Weighted Parties (Telephone Follow-Up)	51,571 %	10,028 %	10,120 %
Very likely	37	24	39
Somewhat likely	27	28	39
Not very likely	16	20	17
Not at all likely	13	27	2
¹ Reported by adult in general admission visitor party who did most trip planning and was best able to report on party expenditures and who responded to the telephone follow-up survey. ² Caution: Small base size. ³ Caution: Extremely small base size. *Less than 0.5%. Source: Detailed Tabulations, Volume II, pages 1203.			

27. Importance Of Various Factors In The Decision To Return To Toronto

When asked to rate a variety of factors on their importance in a decision to return to Toronto, out-of-town visitors regardless of their place of residence focus on the activities the city can offer. Specifically, they rate Toronto's *many cultural activities and attractions* and the claim that the city has *a lot for adults to see and do* as particularly important factors in their decision to return. Other features that seem to figure prominently in a return decision include the city's cosmopolitan atmosphere, its cleanliness, its shopping opportunities and the helpfulness and friendliness of its residents.

Table 33

Reasons for returning to Toronto				
	Total Out-of-Town Visitor Parties	Ontario, Outside Toronto	Quebec	USA
Weighted Parties (Telephone Follow-Up)	51,571	31,423	10,028	10,120
Household Visitor Parties Unweighted	518 #	180 #	174 #	164 #
It offers many cultural activities and attractions	8.3	8.4	7.7	8.8
It has a lot for adults to see and do	8.3	8.4	7.3	8.8
It is a cosmopolitan city	7.6	7.8	6.0	8.6
It is a clean city	7.5	7.5	6.9	8.1
It has good places to shop	7.3	7.9	5.7	7.4
It offers interesting festivals and events	7.2	7.4	6.5	7.3
The people are friendly and helpful	7.2	7.1	6.7	7.9
It is an easy drive from home	6.6	7.1	5.2	6.3
At the present time, it offers good value for the money	6.6	6.6	5.7	7.3
It is a multi-cultural city	6.2	6.1	5.1	7.3
You have friends and family who live in Toronto	6.0	6.9	6.0	3.5
It is the closest big city to where you live	5.8	6.8	3.9	4.6
It has a low crime rate	5.8	5.8	5.0	6.8
It has a lot for children to see and do	5.2	5.7	3.6	4.8
You have business contacts in Toronto	4.1	4.9	3.4	2.6
¹ Reported by adult in general admission visitor party who did most trip planning and was best able to report on party expenditures and who responded to the telephone follow-up survey. Averages are based on a ten point bi-polar numeric scale where 1/0 is an extremely important reason and 1/ is not a reason at all. Source: Detailed Tabulations, Volume II, pages 1207/ 1236.				

A decision to return to Toronto is supported by different characteristics, depending on the origin of the visitor. For example, American visitors assign appreciably greater importance to Toronto's cleanliness, its multi-cultural flavour, the currently favourable exchange rate, Torontonians' friendliness and helpfulness, and the city's low crime rate than do Canadian visitors.

Shopping and being the closest ~~big~~ city are especially prominent motivators to Ontario residents who live outside Toronto, whereas few factors apart from the availability of cultural activities and the number of different activities available in Toronto are seen as instrumental in a decision to return to the city among Quebeckers.

28. Reaction To The Visit At The Art Gallery Of Ontario

Almost all visitors to the Barnes Exhibit were pleased with their experiences at the Art Gallery of Ontario on the day of their Barnes visit. When asked to rate their visit to the Art Gallery of Ontario on the day they went to the Barnes Exhibit, visitors gave the AGO an average rating of 8.5 on a scale ranging from *poor* (1) to *excellent* (10). Almost 9-in-10 visitors from the USA were very positive in their endorsement of the AGO (8/10), and more than 8-in-10 Quebeckers gave the AGO a very positive rating.

Because the Art Gallery of Ontario was a *new* experience to many visitors from the USA and Quebec more than one half of these visitors had not been to the gallery prior to their Barnes Exhibit visit their reactions likely reflect the newness of the experience. For local residents and other Ontarians, ratings of the AGO experience are noticeably lower than are those for more distant visitors likely reflecting their more extensive experience with the AGO.

Table 34

	All Barnes Exhibit Visitors	Origin				
		Total Ontario	Toronto ²	Other Ontario	Quebec	USA
Household Visitor Parties Unweighted	1595	874	495	379	260	315
Weighted Parties	217,213 %	164,978 %	97,002 %	67,976 %	15,197 %	20,609 %
Positive (8/10)	81	79	78	81	84	87
Neutral (4/7)	18	20	21	19	15	12
Negative (1/3)	*	*	*	*	*	0
Average ³	8.5	8.4	8.3	8.5	8.7	9.0

¹Reported by adult in general admission visitor party who did most trip planning and was best able to report on party expenditures.

²Toronto includes Census Division 20 and other suburban areas and visitors who claimed to be commuting to work or school. *Less than 0.5%. ³Averages based on 10 point bi-polar scale where 1/10 is *Excellent* and 1/10 is *Poor*. Source: Detailed Tabulations, Volume II, page 1028.

29. First Source Of Information About The Barnes Exhibit

Survey respondents indicated that advertisements in daily or weekly newspapers (41%) and word-of-mouth from friends or family (27%) were the primary ways Barnes Exhibit visitors *first* heard about the exhibit. Other communication vehicles responsible for the initial awareness of the Barnes Exhibit were identified by respondents to be television (7%), radio (6%), other print advertising such as magazines (5%), billboards or posters (3%) and direct mail (2%).

Table 35

	All Barnes Exhibit Visitors	Origin					
		Total Ontario	Toronto ²	Other Ontario	Quebec	USA	Total Non-Domestic
Household Visitor Parties Unweighted	1595	874	495	379	260	315	375
Weighted Parties	217,213 %	164,978 %	97,002 %	67,976 %	15,197 %	20,609 %	27,033 %
Advertisements in daily/weekly newspapers	41	44	44	44	44	32	28
Friends & relatives/word of mouth	27	25	26	24	27	32	35
Television	7	8	7	9	8	2	1
Radio	6	6	6	7	6	3	2
Other print advertising	5	5	4	6	5	9	9
Billboards/posters	3	2	3	1	-	4	8
Direct mailing	2	2	2	2	3	3	2
¹ Reported by adult in general admission visitor party who did most trip planning and was best able to report on party expenditures.							
² Toronto includes Census Division 20 and other suburban areas and visitors who claimed to be commuting to work or school. Source: Detailed Tabulations, Volume II, page 1053.							

Word of mouth, and to an appreciably lesser degree, other print advertising, played more prominent roles in sparking initial awareness of the Barnes Exhibit among visitors from the USA than among those from any other location.

30. Incidence And Locations Of Out-Of-Town Cultural Trips

Barnes Exhibit visitors who claimed that the Barnes Exhibit was influential²⁵ in their decision to travel to Toronto were asked to estimate about how many out-of-town trips they usually take each year for the purpose of attending a major culture event. Those who claim to take at least one such trip a year were asked to indicate the locations they had visited largely or partly to attend a major culture event in the past five years.

Table 36

	Origin			
	Total Non-Local	Other Ontario	Quebec	USA
Household Visitor Parties	1,100	379	260	315
Unweighted				
Weighted Parties	120,211 %	67,976 %	15,197 %	20,609 %
Usually Take At Least One Out-of-Town Culture Trip Per Year	55	66	64	52
Not Asked/Don't Know	38	24	35	46
Asked But Does Not Usually Take Any Out-of-Town Culture Trips Each Year	7	10	7	3
Average Number of Culture Trips Taken Each Year Among Those Who Usually Take Any	5.6 Trips	6.3 Trips	3.1 Trips	4.8 Trips
Any Ontario (NET)	48	62	44	36
Toronto	44	59	37	34
Other Ontario	29	42	22	12
Some Other Location In Canada	21	24	41	9
A Location in the USA	28	29	27	47
A Location in Europe	19	22	25	16
¹ Reported by adult in general admission visitor party who did most trip planning and was best able to report on party expenditures. ² Locations add to more than 100% because of multiple mentions by the same visitor. Source: Detailed Tabulations, Volume II, pages 331/339; 397/401.				

About one-half of all out-of-town visitor parties claim that they usually take trips each year specifically to see cultural events or attractions, a further 4-in-10 were not asked about such trips because the Barnes Exhibit was not particularly influential in their decision to visit Toronto (5 or less on an eleven point scale), and approximately 1-in-14 suggest that the trip which included the visit to the Barnes Exhibit was a rarity: they normally take no trips each year specifically for cultural events.

On average, Barnes Exhibit visitors who take *any* out-of-town trips for cultural purposes take between five and six such trips per year. Many Ontario Barnes Exhibit visitors live near Toronto. As such, these out-of-towners may find it easy to take cultural excursions to this city, and seem to make such trips more often (6.3) than do Quebecers (3.1) or Americans (4.8) who take any cultural trips over a year long period.

Cultural destinations over the past five years vary quite dramatically by a Barnes Exhibit visitors place of residence. Ontarians are particularly likely to have taken a cultural trip to an Ontario destination over a five year period (66%), whereas only 4-in-10 Quebecers and even fewer Americans did so (36%). Alternatively, Quebecers are particularly likely to go to cultural events in provinces *other* than Ontario (41%) and Americans are likely to seek their cultural destinations within their own country (47%). More than one-fifth of Canadians who visited the Barnes Exhibit and live in Ontario or Quebec went to a cultural event in Europe in the past five years a marginally higher proportion than is evident among Americans (16%).

NOTES

¹ Research Resolutions sub-contracted the field and tabulation operations to Insignia Marketing Research Inc. and Consumer Contact, both in Toronto, but maintained project management and analysis responsibilities for all aspects of the Barnes Exhibit Economic Impact Study.

² The study excluded special events such as time periods in which the Art Gallery was reserved by corporate sponsors for their guests and Tuesdays which were set aside for student groups to visit the Barnes Exhibit.

³ The following table displays the response rate on the telephone component of the project.

Table A-1

	Total Numbers Attempted	
	(705)	
	#	%
Refusals	25	4
Wrong/Duplicate Number	46	7
Not in Service	24	3
No answer/busy/answering machine/respondent not available (after at least 4 attempts)	92	13
TOTAL COMPLETIONS	518	73

⁴ For the detailed expenditure question (Q. 13 of the Exit Survey), 7% of completed questionnaires had only a ~~total~~. The remaining 93% included a breakdown of expenditures by category.

⁵ Following the conventions used in Statistics Canada's International and Canadian Travel Surveys, and the International Monetary Fund guidelines, air carrier expenditures are assigned to a location on the basis of the place of registration of the airline company. If the airline is a domestic one, carrier expenditures are assigned to the location of trip origin. Thus, if a person took an Air Canada or Canadian Airline flight to reach Toronto from Montreal, air carrier dollars would accrue to Montreal. If the flight was between Thunder Bay and Toronto, the carrier dollars would accrue to Thunder Bay. A Canadian carrier flight between New York City and Toronto would accrue to Toronto, but an American carrier flight between the same cities would accrue to New York City.

⁶ Only trip expenses that occurred within Ontario were captured in the survey. ~~Excursions~~ are same-day trips by local residents/commuters. All data on which the economic impact estimates are based are final, although minor changes in some estimates could occur when the new I/O tables for Ontario are made available by Statistics Canada. Total spending includes spending at the AGO and related expenses by local residents and all spending *in Ontario* on the trip that brought them to the Barnes Exhibit by non-local visitors.

⁷ The volume of expenditure impact that can be said to have occurred in Ontario *solely* because the Barnes Exhibit was at the Art Gallery of Ontario is less than total spending because some money would have been spent whether the Barnes Exhibit were in Toronto or not. To obtain an estimate of

how much spending the Barnes Exhibit generated for the province spending that would not have occurred without the exhibit the role of the exhibit in the visitors trip decision-making process for out-of-town visitors, and substitution effects for local residents were taken into account. The reader is referred to the Methodology section of this report and/or to the Technical Appendix for descriptions of these procedures.

⁸ Groceries purchased in stores are also included in **Food/Beverages**.

⁹ Spending estimates include survey responses to **Non-site** spending questions, estimates of catering and other expenses associated with corporate events (flowers, invitations and other miscellaneous items have been assigned to **Food** in the calculations), and ticket, food service and gift shop sales for students and other groups on the non-general admission day (Tuesday). Estimates from the survey may not reflect total receipts at the AGO because there were alternative sources of revenue for the gift shop (e.g., off-the-street trade, particularly during the Christmas gift-buying period), use of Gallery services by visitors who did not attend the Barnes Exhibit, and ticket purchases made by people other than the surveyed household on behalf of the household visitors (e.g., by friends or relatives, corporations, etc.).

Table A-2

On-site Spending By Barnes Exhibit Visitors		
	Total Spending At the Art Gallery of Ontario	
	\$13,100,000	
	\$	%
Ticket Sales	\$5,600,000	43
Food & Beverages	\$1,500,000	11
Gifts & Souvenirs	\$5,400,000	41
Gallery Memberships	\$600,000	5
Source: Research Resolutions Detailed Tables, Volume I, page 20/23 and special calculations undertaken by MCTR based on data supplied by the AGO for non-general admission visitors. Figures have been rounded to the nearest 100,000. Unweighted base = 1,595.		

¹⁰ **Room nights** are equivalent to **party nights**.

¹¹ Motels, bed & breakfast establishments, resorts/lodges and camping/trailer facilities.

¹² See #6, above.

¹³ See #7, above.

¹⁴ *Induced impacts*: In response to the initial tourism expenditures, employment income was generated throughout Ontario's economy. This income, when spent on consumption goods and services, generates

further demands in the economy known as induced effects.

Indirect impacts: Are those associated with the industries that supply goods and services to those industries that cater directly to the visitors' needs.

Direct impacts: Are those associated with the sectors catering directly to the visitors' needs.

¹⁵ Groceries purchased in stores are also included in **Food/Beverages**.

¹⁶ Local residents are people who live in Census Division 20 (Metropolitan Toronto) and those commuting to school or work in Metro Toronto.

¹⁷ Rogers, Judy. Research Resolutions. *Extending the Use of the Canadian Travel Survey, Final Report, The Pilot Project*, March, 1995, p.45.

¹⁸ *Ibid.*, p. 37.

¹⁹ *Ibid.*, p. 37.

²⁰ See Detailed Tabulations, Volume II, page 619.

²¹ General admission visitors only.

²² The reader is referred to Section C-1 for the proportion of expenditures and estimates of economic impact that are directly associated with the Barnes Exhibit.

²³ See #16, above.

²⁴ See Detailed Tabulations, Volume II, page 19.

²⁵ **Influential** is defined as giving the Barnes Exhibit a score of six or more on the eleven point **influence** scale.